

Social Enterprising Europe (SEE)

SEE LEARNING PROGRAMME

FACILITATOR'S HANDBOOK

WP4: Training Materials

Deliverable 4.1: Facilitator's Handbook

Version Experimentation

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INTRODUCTION

WHO IS THIS LEARNING PROGRAMME FOR?

This learning programme is designed for people who want to start or improve a social enterprise. It is suitable for people who already have basic understanding of entrepreneurship as well as for new students.

This programme does not address all the possible aspects of running an enterprise. Instead it focusses on the particular aspects of **social** enterprise.

The learning programme consists of eight modules that are integrated but also can 'stand-alone'. They are:

- MODULE 0. PREPARING to change the world
- MODULE 1. BUILDING a better world
- MODULE 2. CREATING social change
- MODULE 3. CONNECTING with stakeholders
- MODULE 4. ACCOUNTING for quality and impact
- MODULE 5. INVOLVING people and leading
- MODULE 6. ACHIEVING financial sustainability
- MODULE 7. PLANNING Social Enterprise

Dealing with different learners

The content and activities contained in this Facilitator's Handbook should be tailored, by the facilitator, to the specific group of learners. Therefore, we recommend that you understand the profile of the participating learners and their expectations before designing the workshops.

It is possible that within the same group of learners you will find people at different levels of knowledge and experience in business and social issues. We recognize that a diverse group can, however, bring a great deal to the learning process for all participants.

The workshops should be designed to address the needs of the majority of the learners. The more knowledgeable learners can contribute greatly with their expertise to the learning of others. However, if the difference in knowledge and experience between the participants is very wide, it may be necessary to advise the more knowledgeable ones that the level may be too low for them. They can then be advised to participate only in the modules that they find most useful to them.

We also recognize that the concept of "social enterprise" is relatively new in some countries. We hope that this series of modules will help learners come to grips with an understanding of definitions and how to more effectively establish and run a social enterprise.

Differences between this series of modules and a "traditional enterprise" learning programme

Traditional enterprise or business programmes often use the same terminology but intrinsically mean something different. We do not want to repeat what one may learn in a traditional learning programme but add to it. The SEE Learning Programme places emphasis on social issues. The following table illustrates the difference in some important enterprise aspects.

Enterprise aspects	Traditional enterprise programme	SEE Learning Programme
Mission of the enterprise	Business purpose – maximise profit	Social purpose – maximise social and community benefit
Staff, governance, management	Money decisions: hierarchies; chain of command	Social motivation; participatory leadership; democracy; working with volunteers; inclusive employment
Products and services	Any type	Positive contribution to society; ethical reflection about sustainability and ‘good’ work
Market studies	Demand of customers	Social needs; aware of the customers sensitivities and needs
Marketing	Advertising budget and competition	Social communication; benefits for the society; transparency; fair prices and collaboration
Finance	Loans and investment	Crowd funding; ‘sweat’ equity; social investors
Legal structures	Companies, partnerships	Co-operatives; companies, associations; foundations; not for profit enterprises
Impact	Profit and loss; balance sheet	Social impact as well as financial sustainability

It is important that people managing the social enterprises understand that the enterprise exists to create social and/or community benefits. Social enterprise straddles the worlds of business and social/community benefit where economic activity is undertaken for the benefit of people, the planet and society and not for the benefit of individuals at the expense of others (or indeed at the expense of the planet!).

WHY SHOULD LEARNERS PARTICIPATE IN THIS LEARNING PROGRAMME?

The methodology used in this learning programme is firmly based on the **practical** application of concepts and what it means to a social entrepreneur. The activities suggested encourage interaction with other learners (peer learning) and the facilitator is expected to use educational tools and techniques to help this peer learning.

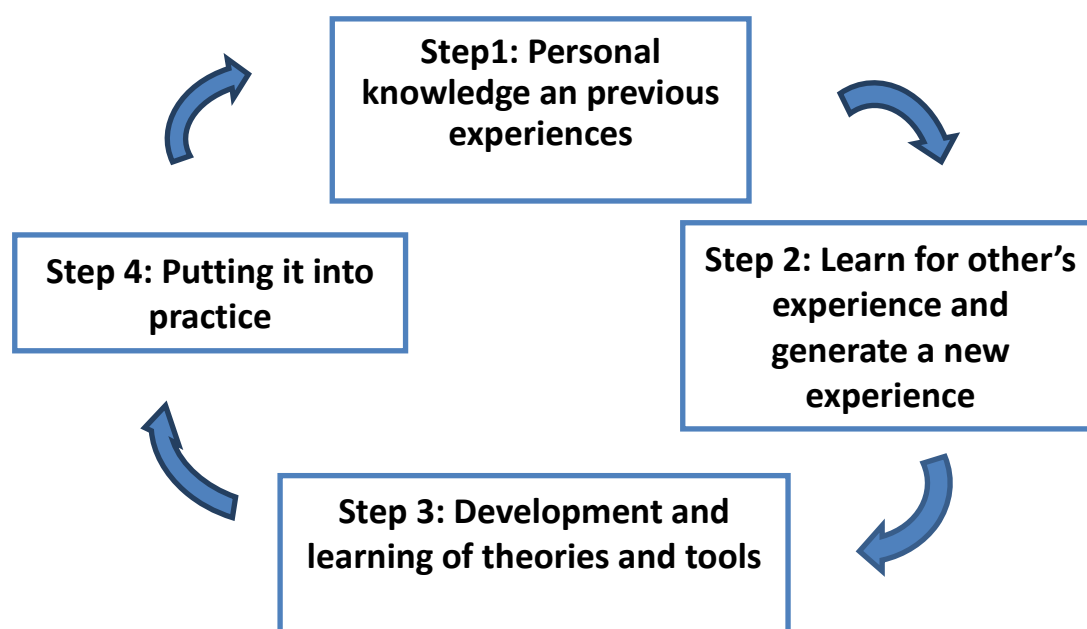
The encouragement of active participation during the learning programme will help to create communities of social entrepreneurs. The resultant networks will help the learners form alliances with other similar people and this will ultimately strengthen their social entrepreneurship and assist social enterprises more widely to achieve their social purposes.

PEDAGOGY AND OUTCOMES

The learning programme has been structured around a set of outcomes for each module.

In order to facilitate learners to progress through the programme, we use the Kolb Cycle.

The Kolb Cycle (see below) encourages learners to talk about how much they know already. It then suggests exposure to activities and new ideas. This is followed by a time to reflect on how that might be applied to their own situation or how the module has changed them.



HOW TO USE AND NAVIGATE AROUND THE LEARNING PROGRAMME AND THE MODULES

The SEE Programme proposes that you as a facilitator may want to use some modules in a specific order. However, it is flexible enough to use it as you see necessary depending on your background and the needs of the learners.

The learning programme cannot entirely match the progress of all the learners and some may not want to start a social enterprise immediately. We recommend that you still use the modules to get across the stages involved in social enterprise development as an **idea** - applying that idea to the different activities in each of the modules.

In this Facilitator's handbook you can see the overall methodology. We have taken a progressive approach, from a personal reflection on the environment, through to

reinforcement of skills and knowledge and up to the development of a social enterprise plan. The following diagram illustrates this with two preparatory modules (0 and 1); and modules 3, 3, 4, 5 and 6 standing alone but still contributing to the social enterprise plan (7).



Structure of each module

In essence, each module is structured in the following way:

1 Presentation of the module

Module subject/title	Short, memorable and informative - capturing the essence of the module
Modular outlines	Introduction to the subject with an overall aim. This outline will also state the scope of the module and any themes
Learning outcomes	This is the expected changes in the learning and will cover what the learner will be able to do after tackling the module

2 Activities following the Kolb learning cycle

S1: Personal knowledge and previous experiences

This part relates to the experience and knowledge of the participants.

S2: Learn from other's experiences and generate a new experience

This part relates to the experience and knowledge of **others**, mainly cases studies. It will include activities to generate a new experience with the participants.

S3: Development and learning of theories and applicable tools

This part introduces theories and tools about the issue and invites the group to generate new ones.

S4: Putting it into practice

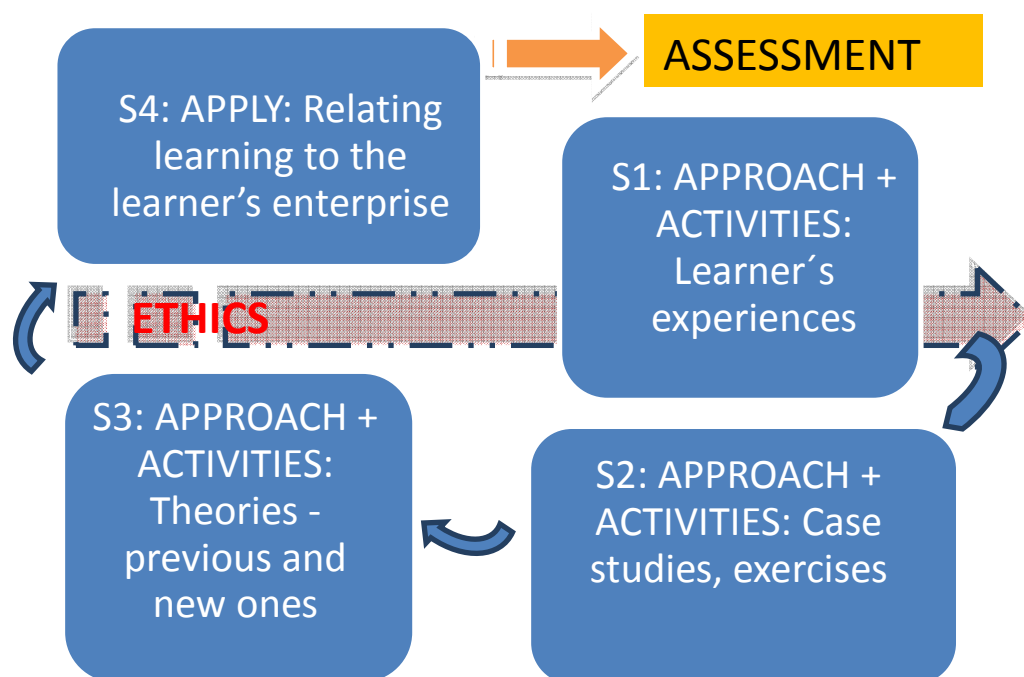
This part is the end of the module where the learners should be able to apply their own ideas to their own social enterprise. If learners do not have an enterprise yet will be expected to choose another real situation.

3 Cross-cutting issues

Throughout each module there will be 'cross cutting issues' which we have termed 'ethical considerations'. These may include issues around gender, environment, race and other societal considerations.

4 Assessment and reflections

At the end of each module there should be a time for the learner to assess the learning they have achieved and to reflect on that learning.



Different ways to participate in the course

Although the SEE Learning Programme proposes an order, content and specific activities - it can however be used as thought necessary, based on the prior knowledge and the professional needs of the learners. It is a flexible learning programme.

The learning programme consists of independent modules so that each person can participate in the parts he/she wants to.

The method offers tools and concepts and each learner can use them to improve their own enterprise, build a social enterprise plan or just to reflect about social enterprise in general. The following diagram illustrates this and compares it to building different structures using the same 'bag' of differing bricks.



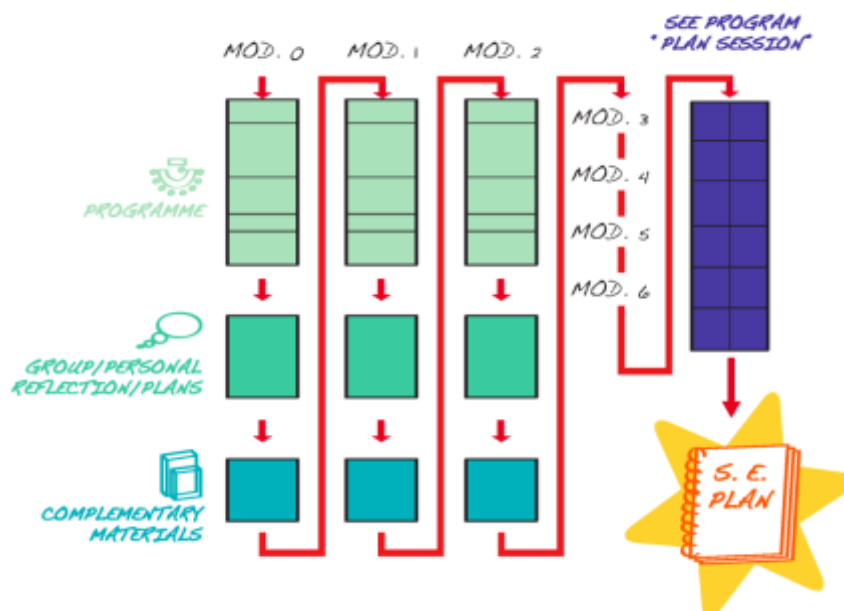
Each Module has different parts:

- Programme: main contents of the module: concepts, attitudes to promote, activities and tools
- Reflection and plans: activities to reflect, assess and apply to each participant's situation; and
- Complementary materials: suggestions for more in-depth learning such as books, links, visits, etc.

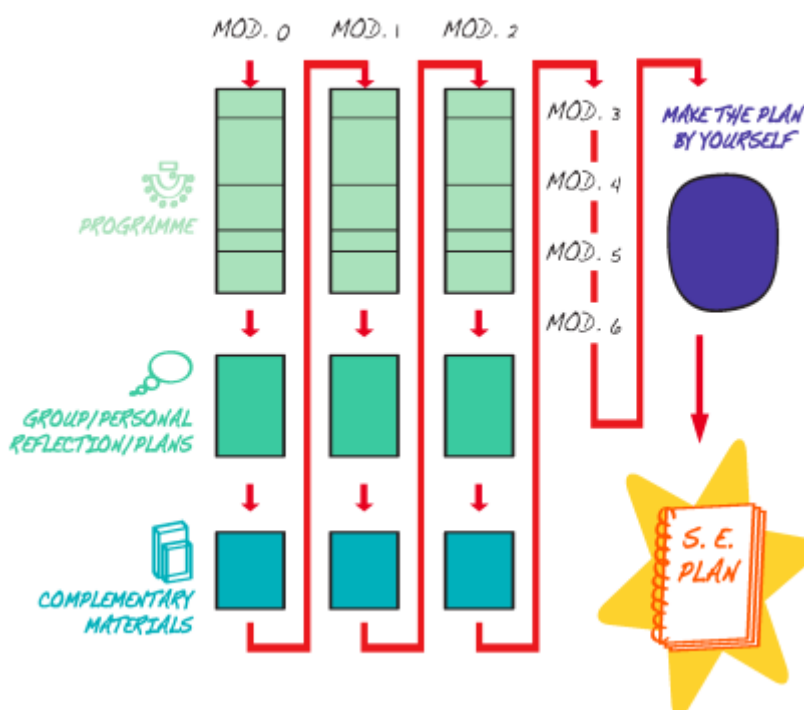
In addition, the learning programme allows for the facilitator or the learner to follow the learning programme in a flexible way. The participating options are to follow the classic 'tour'; 'tour' without following the module that addresses the social enterprise plan; go straight to the social enterprise plan; or go for a 'free tour'...

The options to participate are:

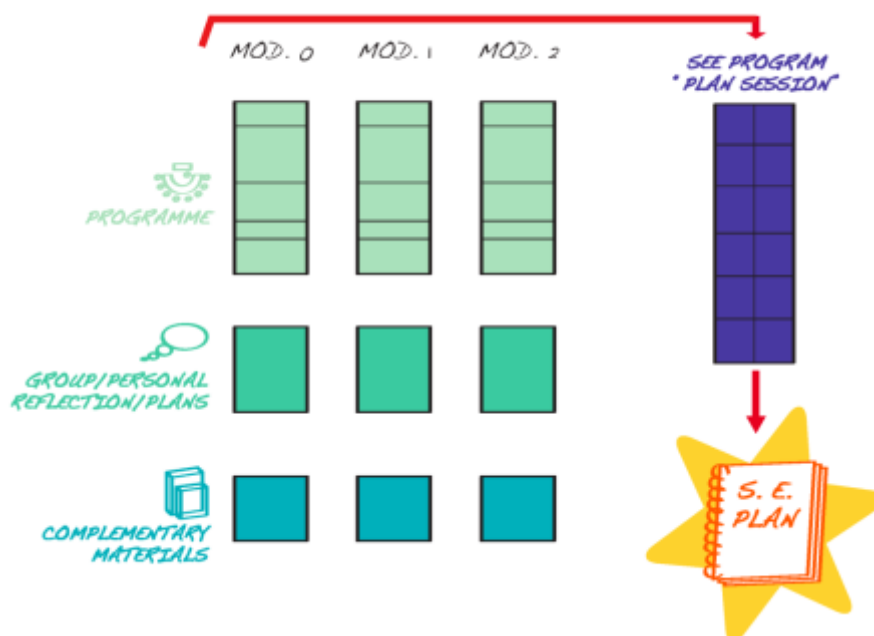
- 1 "Classic Tour" - complete all modules and the business plan:



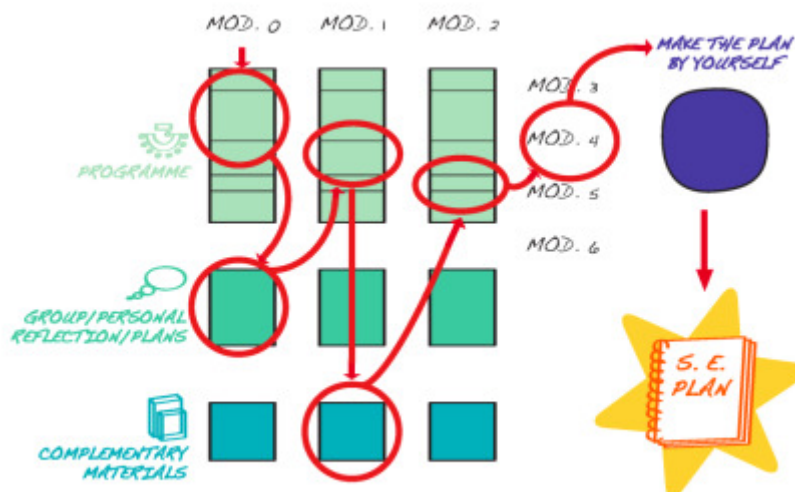
- 2 **Tour without social enterprise planning** - complete workshops (all or part) and make the plan on your own.



- 3 **No tour** – going straight to the Social enterprise planning module



- 4 **'Free Tour'** - learners choose which parts of the modules to participate in. The plan follows their own design and addresses their own needs.



HOW TO APPLY THE VALUES AND APPROACH OF THE PROGRAMME

Underpinning the programme will be clear principles borrowed in part from the Social Enterprise Academy but shared by all partners in the SEE project). These principles are summarised as follows:

- **The learning should build on the experience and knowledge of the learners:** Everyone has useful knowledge and experience to share and each module should be designed to enrich the learner's own practice by learning as much as possible from what others are doing.
- **The learning will thrive on exchange between people:** We shall use as much as possible peer learning with facilitators who are not experts but peers. However, the facilitators should understand social enterprise and will create opportunities for learners to share ideas, experiences and learning. This will open up dialogue amongst learners.
- **The learning will focus on critical questions:** Questions open up spaces for new thinking; they stimulate the brain and creativity. The facilitators should use questions to support and challenge the learners to come up with their own solutions.
- **The learning will stimulate change, development and growth:** The focus will be on the personal learning process. The learning programme will enable learners to be self-aware, building on their own strengths, having the courage to try out new ways of doing things, and learning from their experience.
- **The learning will encourage entrepreneurship and blue sky thinking:** The programme will create a climate which is conducive to blue sky thinking: lots of contributions, ideas, brainstorming, mind-mapping, using pictures and images and creating metaphors.
- **The learning will help learners to take the initiative and act:** Learners will be helped to come up with new insights, new ways of working and of putting the learning to use. It should celebrate a learning journey which has brought about change and development through action.
- **The learning will create space for reflection:** Learners, where possible, will be offered a safe and supportive space with peers to take time out to reflect on their practice, goals and self-development. Allowing time for action learning, group work and feedback is considered vital.

As facilitator, you will have to adapt and design each modules to each group and try to reflect on the values and principles. Here you are some ideas:

Principles (paraphrased from above)	Example of where this principle might manifests itself...
The learning should build on the experience and knowledge of the learners	First step of the Kolb cycle
The learning will thrive on exchange between people	Debates, group activities

The learning will focus on critical questions	The contents and outcomes proposed but questions should be used by the facilitator and encouraged in a supportive way between the learners
The learning will stimulate change, development and growth	Learning log, self-reflection
The learning will encourage entrepreneurship and blue sky thinking	Creative and innovating activities
The learning will help learners to take the initiative and act	Practical examples and case studies, the social enterprise plan, assessment
The learning will create space for reflection	Activities and time for reflecting

The learning programme will bring, as much as is possible, a central ethical dimension to business activity which focuses on social justice, fairness and an obligation to the most disadvantaged in society.

The ethic dimension is a 'must' for a social enterprise and should run through each of the modules. The enterprise survival and the profit is not a priority for a social enterprise **if** the ethic is lost and the activity does not reflect the mission. Sometimes it will be difficult to resist the pressure of the market and social entrepreneurs should be made aware of this. Having said this, the facilitator does not have to judge the learners' motivations, only to facilitate their periods of reflection.

In each module, the SEE Learning Programme proposes some key points to promote debate in the group and personal reflection. It is not a separate part, but the facilitator should be able to work the ethics in a cross-wide manner throughout the course.

ROLE AND PROFILE OF THE FACILITATOR

This is a 'learning' programme, not a 'training' programme. Thus, it focuses on the learning of the 'learner' with the help of a 'facilitator' and not the 'training' of the 'student' with the help of a 'trainer/lecturer'.

The programme should maximise the time spent on the activities for the learners and minimises the time taken up by the facilitator. So, please remember that the facilitator role is as a coordinator, coacher, adviser and assessor, not a "teacher".

This programme requires a facilitator with experience in delivering within a learning and participative process, and with knowledge and experience in social enterprise. The facilitator or team has to be able to adapt and set the approaches and suggestions included in this handbook into a specific plan suitable for the learner's profile.

The facilitator has to be able to adapt his/her own plan to the evolution and development of the learning and give tailored advice to each participant.

Also, the role of the learners is not a traditional one. They have to actively participate in the course, investigate, debate, work in group, generate new ideas and contribute with their experience and knowledge. We recommend that this be made very clear at the outset

At appropriate times, it would be interesting and useful to invite experts or social entrepreneurs to emphasise some of the course content or respond to specific demands.

ACTIVITIES TO BUILD THE GROUP OF LEARNERS

At the start of each module the facilitator should be able to “create the group” through using an exercise to build trust between the learners. It is also advisable to establish agreed rules within the learning group. Both these exercises can help to develop mutual confidence and collaboration.

Keep in mind that there will be participants who will not attend the make the full itinerary of modules. So, there will be a different group for each module and you will need to build trust in the group each time. Therefore, it may be necessary to have written rules and create virtual places for exchanging and meeting new participants.

Suggestions to help build the group of participants and set rules and communication channels:

1 Try to show the relationships and affinities that may already exist between the participants. For example:

Each participant is invited to write their name on a flipchart and tell a story about it. This helps learners getting to know each other and allows participants to find their voice in a personal way early on; or...

Use a ball of wool to physically show affinities, linking commonalities between learners

2 Set ground rules for the workshop by getting the learners to divide into groups and discuss, agree on and write on a flipchart the ‘ground rules’ for all the workshops.

3 Propose tools to communicate outside the classroom and to deposit information and knowledge with the group e.g., Titanpad, Gdrive, etc.

DELIVERY OF THE MODULES

This programme is designed to be delivered face to face, on line or both (blended learning). The contents and outcomes are the same but the activities for the on-line have to be different as learners will be learning by themselves.

MATERIALS MAP

In order to enable future collaboration, modification and development of the modules through updating of the activities, references and contents, this learning programme has developed a ‘virtual knowledge tool’ or Materials Map. This Materials Map will contain all the details of possible activities, contents and other information necessary to tailor each module. It will also have book references, links to web pages, institutions address and a file database.

>>> <http://learn.socialbiz.eu/>



To add development and progress, each time a facilitator designs a module for social enterprise, he/she is encouraged to add comments and new resources in this Materials Map.

The links and instructions to access this Materials Map will be facilitated through the SEE project web page.

>>> <http://socialbiz.eu/>

LESSON PLANS

The SEE Learning Programme proposes a process, structured in modules and a pedagogic orientation. Each module gives an approach for activities and debates and makes suggestions about the timing and duration of the different sessions within each module, so as to give balance to the learning process.

The SEE method does not provide a specific and fixed lesson plan because each group is different. However, the lesson plan is a very necessary tool for the facilitator. So, we have provided some recommendations about preparing this plan but the facilitators have to use their expertise and creativity to design it. SEE also offers a number of references and materials to help with this task. [Examples of Lesson Plans for each module will be published in the Materials Map].

The activities may vary a lot with the type of delivery: “face to face” or “on line” or “blended”. Clearly, individuals working on-line will go at their own pace.

The following is a small example of the structure of ‘lesson plans’ that are available in the Material Map. In the Materials Map you will be able to find examples of completed lesson plans based on previous experimentations with this learning programme. Each facilitator is invited to contribute to enrich these lesson plans.

Timing	What is addressed	Activity (inc. use of case studies)	Resources
0.5hr	To have introduced the module, the people and developed trust between learners	Introductions – write up your name on a flipchart and tell a story about it Exercise on building trust	Icebreaker based on building trust
1 hr	Etc.	Etc.	Etc.

CASE STUDIES

The SEE Learning Programme has 12 detailed and written case studies from across Europe. There are also 4 full case studies with written materials and video clips which analyse and illustrate the experiences of social enterprises. The case studies can be used with the learners.

SOCIAL ENTERPRISE PLAN (Module 7)

The methodology used in this learning Programme is very open to diverse participation. The facilitator has to deal with learners with quite different situations and not everyone will want to work towards a social enterprise plan – although some will.

Some people may prefer to concentrate on their social enterprise plan at the end, after completing all the modules. Others might prefer to make it after each module and by themselves. The facilitator has to be prepared to address all these possibilities.

In Module 7 we offer the Guide for Social Enterprise Planning

>>> <http://learn.socialbiz.eu/blog/guide-to-social-enterprise-planning/>

or a simpler Business Model Canvas

>>> <http://learn.socialbiz.eu/resources/single/?id=20>

As with all models, both are guides and can be changed or adapted to each situation. In Module 7 there are links to these tools.

We recommend that each learner (individual or in group) has a social enterprise idea from the beginning of the planning process. It would be better to work with a real social enterprise, if possible.

ASSESSMENT, REFLECTION AND ADVICE

This programme will be delivered in several countries. In each case, the assessment system will be different. In any case, the important aspect is to be useful for social entrepreneurship.

A general Evaluation Sheet is available in the Materials Map and should be used at the end of each module to allow the learners to assess the quality and effectiveness of the learning.

In order to facilitate the assessment, the programme proposes a tool: the 'reflective grid'. This model can be found in Material Map but see the grid below. Of course, this model can be adapted to each situation.

>>> <http://learn.socialbiz.eu>

Module title:	
What I found most useful about the module...	What I found least useful about the module...
What I shall do differently in the future...	What I have concerns about...
Things I need to think about or discuss more...	Things I need further clarification on...

Each module cannot be all things to all people and it may be necessary for the facilitator to signpost learners to other appropriate and relevant advice. Learners should be advised of other resources and where they can be obtained. It is essential to be able to point learners towards other experienced people with specialized knowledge and skills.

USE OF THE LEARNING LOG

The Learning Log is a tool to stimulate the learner's reflection and to build up a resource that the learner can refer to at a later date. The goal is that each learner creates her/his own learning conclusions after each module. It is personal and is entirely to benefit the learner.

>>> See <http://learn.socialbiz.eu/resources/single/?id=21>

We suggest that it is a voluntary tool. The facilitator only has to motivate its use and to show how it can be kept.

Example of a learning log:

Date	Issue, concept, idea seen in the workshop	What I learned from it?	How I will specifically use it in my idea or enterprise?	Further personal investigations to deepening

ACCREDITATION

The SEE Project is not committed to obtaining accreditation for this learning programme. However, the SEE Project *may* look at accrediting the learning programme with a suitable accrediting agency in each country or at European level.

In the future if accreditation is obtained it would require proof that the modules have been successfully completed. This could be done by the learners keeping a portfolio which could be presented for accreditation.

The design of this SEE Learning Programme can provide...

- A specific plan for the programme with time spent learning
- Evidence of attendance
- A Learning Log (or it could be a portfolio of work done)
- A social enterprise plan

SUMMING UP AT THE END OF EACH MODULE

Each module should be finished with a reflection about “what all this is about” and what has been achieved – referring back to the outcomes required.

This is a way to reinforce the learning process and review the main concepts, solve final doubts and introduce the next steps of the process.

MODULE 0. PREPARING to change the world

MOTIVATING FOR SOCIAL ENTREPRENEURSHIP

This module is about personal reflections and motivation. Setting up a social enterprise is an important choice, and an entrepreneur should know her/himself well. As a facilitator, you are not called to judge participants' motivations, rather, to help them become aware of their own motivations.

To do this, you should consider the possible different profiles of participants.

There may be people attracted to social enterprise by the novelty of the concepts. Others may be attracted by all the recent "marketing" of social entrepreneurship. Others may have spotted an opportunity to tackle a social need. And others may just be drawn to know more about it. On the other hand there may be some learners who have been working in this field for a while and may want to 're-charge their batteries'; others may want to check out their actual social impact; others may just want to learn more about what others are doing in the field of social enterprise. There is a whole host of reason why learners want to learn and in all cases an exploration of motivation and realistic reflection should be encouraged and supported before moving on.

LEARNING OUTCOMES

By the end of the module, the learner will have worked towards the following learning outcomes:

... become aware of the complexity facing the social problem they want to address and – at the same time – created and managed a business to tackle that problem or need. Therefore, it is important to ensure that participants **are able to have a better understanding of their role in a changing world.**

... **become more self-aware of their own motivation for working in this area** in order to avoid errors and frustrations. Many people who attend this module may think they do not have enough experience in the social world, or in entrepreneurship but may have good intentions to "change the world".

...**identified their own competencies and be able to critically analyze their skills, both individually and as a team.** Starting a social enterprise requires some special skills and abilities for managing motivations and emotions which are different to for-profit businesses. Among these skills is the capability to juggle with social goals and sustainability as well as to manage conflict and burn-out.

ACTIVITIES TO GET THE PROPOSED OUTCOMES: DEVELOPMENT OF THE MODULE

In designing this module it is important to get the learner to recognize the source of his/her support systems and at the same time to be able to address the complexities and difficulties of social change.

STEP 1: Personal knowledge and previous experiences (estimated time 1.5 hours)

Suggestions for activities:

- 1 Create an activity that makes learners express their motivations, interests, desires, professional profile and entrepreneurial experience. For example:

Propose a way for each person to express: What experiences led them to create a social enterprise? Once this is established, the facilitator can make up questions: eg. is the self-employment-part of your motivation? Or: do you like working directly with disadvantaged people? Share this as a group activity; or

Write a short piece on one's own motivation and share with other participants

- 2 Individual and group experiences of the complexity of a changing world. For example:

Construct an exercise to elicit personal examples of complex social problems that learners have faced; or

Consider a case study with a complex social problem such as Re-Union

>>> <http://learn.socialbiz.eu/blog/re-union/>

- 3 Ask the participants to identify the competences that are compulsory or desirable to create and run a social enterprise and then ask each participant to identify their own skills and abilities and areas that they could work on.

STEP 2: Learn from other's experiences and generate a new experience - individual and group (estimated time 1 hours)

Suggestions for activities:

- 1 In groups, analyse a social problem, its causes and consequences. Examples:

Show a video of a case study that show the complexity of the world and a particular social problem. You can still use Re-Union

>>> <http://learn.socialbiz.eu/blog/re-union/>

or pick one of the other Full Case Studies

>>> <http://learn.socialbiz.eu/casestudies/>

- 2 Example of motivations and competences to create social enterprises. Examples:

Dinamia case: intrinsic motivations of partners and competences

>>> <http://learn.socialbiz.eu/blog/dinamia/>

- 3 Exercise about the capability to deal with emotions in themselves and others, manage conflict and burn-out. Examples:

- A relevant case study from your experience
- Develop a game around dealing with emotions and managing conflict, for example

>>> <http://www.crnhq.org/pages.php?plD=59>

STEP 3: Development and learning of theories and applicable tools (estimated time 2 hours)

Suggestions for activities:

1 Theories of social change: cognitive dissonance, thresholds, multiple causes. Tools that help show the complexity. For example:

- Method of the "problem tree". Develop your own "theory of change" of how their activities lead to changes in the social problem.
>>> For example, see the MIT definition
<http://web.mit.edu/urbanupgrading/upgrading/issues-tools/tools/problem-tree.html>
>>> This is a very common method: look it up on Google to find more materials!
- "Fishbone" graphic analysis of causes of a problem (also known as Ishikawa method)
>>> http://en.wikipedia.org/wiki/Ishikawa_diagram
>>> This is a very common method: look it up on Google to find more materials!
- Cynefin model – this is a quadrant that enable people to analyse issues or problems in terms of SIMPLE, COMPLICATED, COMPLEX, CHAOTIC. It is really about the environment in which social entrepreneurs operate
>>> <http://learn.socialbiz.eu/resources/single/?id=22#.UzSNgV4RCuU>

2 Theories of motivation: extrinsic, intrinsic and transcendent. Other theories of motivation that can help. Get the learners to reflect on possible motivators "complementary" and their boundaries (e.g., self-employment, market opportunities, social recognition, paternalism, prominence escape personal problems ...). For example:

- Review the previously written in Step 1: motivations for the entrepreneurship and complete them with the theories of motivation .
- Misfit, missionary or mercenary: introduce concepts and use a flipchart with circle and three sections for three elements - where to position learners themselves? - Learners discuss in pairs what is motivating them to work in the field of social enterprise.
>>> Learn more about this approach: <http://coa.sagepub.com/content/28/4/406.short>
- Introduction of the GROW model: Goal, current Reality, Options (or Obstacles), Will (or Way Forward)
>>> <http://learn.socialbiz.eu/resources/single/?id=23#.UzSOI14RCuU>

3 Get learners to identify a list of desirable skills, according to entrepreneurial publications (Please, see also Learner Handbook): resilience, assertiveness, etc. Related exercises could be:

- 'Fears' and their 'dears'. In small groups get learners to work with a flipchart sheet charting their 'fears' and their 'dears' (fears are what they dread will happen when becoming a social entrepreneur; and 'dears' are the support mechanisms they are planning to employ e.g. coach, family, friends, mentors, etc.).
- Promote a discussion about the use of non-violent language

STEP 4: Putting it into practice (estimated time 1 hour)

Suggestions for activities:

- 1 You, as the facilitator, have to encourage learners to apply the learning to their own situation and their own idea for a social enterprise (if they have one). If learners don't have any entrepreneurial idea yet, they can choose another actual situation or think more deeply about a case study they have heard about. This may vary but you may be able to tackle this through...
 - ...the application of the tools and theories of social change to the problem that their social enterprise addresses; or
 - ...some co-coaching with other team members (refer again to the GROW model, see above)
- 2 Ask the learners to write their profile as social entrepreneurs, emphasising relevant personal facts, competences and motivation. This is an important part of the social enterprise plan.
- 3 Ask the learners to make a reflection about the impact on their professional careers of creating a social enterprise - positive and negative consequences. The learners reflect individually and share only what they want to with other fellows.

ETHICAL CONSIDERATIONS TO BE ADDRESSED

The facilitator should be aware when to introduce to the module a small debate about ethical considerations. For example the debate could be about:

- Motivations "good and bad": example: opportunism (use the "social seal" to improve sales)
- A debate over how far "the end justifies the means"
- As the salary is a kind of motivation, debate about the 'balance' of a social enterprise. Should it be similar as a for-profit business or is it different? Is it legitimate to maximize profit if that profit is used for social ends? Etc.

ASSESSMENT AND REFLECTIONS (estimated time 0.5h)

And finally the facilitator should...

- Ensure that there is time for all learners to complete an **Evaluation Sheet** on this module >>> <http://learn.socialbiz.eu/resources/single/?id=64>
- Encourage all the learners to complete the **Reflective Grid** and ask them to make pertinent entries in their **Learning Log**.
- Relate the learning back to the original outcomes and show that they have been tackled.

- Point out to the learners that the results of these exercises will be relevant to parts of the Social Enterprise Plan.

EXAMPLE OF LESSON PLAN

Timing	What is addressed	Activity (inc. use of case studies)	Resources
0.5hr	To introduce the module	Introductions	Icebreaker based on building trust
0.5hr	To set ground rules for the workshop	Exercise on ground rules	Written Ground Rules sheet
1hr	To look at learning styles	Short introduction to learning styles Exercise using the Honey Questionnaire	Honey Questionnaire
1hr	To introduce Action Learning Sets (ALS) as a way of learning	Introduction to ALS Exercise on ALS	Action Learning: Set Roles sheet
1hr	To introduce the GROW model and relate it to self	Introduction the GROW model: Goal, current Reality, Options (or Obstacles), Will (or Way Forward) Exercise	Presentation The Grow Model sheet
1hr	To introduce the Cynefin Model of understanding issues	Introduction to Cynefin Model: Simple, Complicated, Complex and Chaotic issues Exercise	Quadrant sheet
0.5hr	To now consider the learner's self and motivation	Introduction to misfit, missionary or mercenary idea... Exercise	Flipchart
0.5hr	To consider the fears and the support that may be required	Exercise on 'fears' and 'dears'	Flipchart
0.5hr	To collectively think of the key learning points and how they might be used	Exercise: Each learner users a post-it to stick up a learning point from the workshop and explain how they may use it	Flipchart
0.5hr	To reflect on the learning	Exercise to reflect on learning	Reflective Grid

Key Reading:

Action Learning Sets – websites

>>> <http://learn.socialbiz.eu/resources/single/?id=10>

Honey Questionnaire

<http://www.science.ulster.ac.uk/nursing/mentorship/docs/nursing/oct11/Learning%20Styles%20Questionnaire%20%20short%20version%20Aug10.pdf>

MODULE 1. BUILDING a better world

LEARNING ABOUT SOCIAL ENTERPRISES

This module will introduce the learner to the values and purpose of social enterprise, the distinctive elements of social enterprise and how it differs from mainstream business.

LEARNING OUTCOMES

By the end of the module, the learner will have worked towards the following learning outcomes:

...understood why social enterprises are necessary and their effect on people, the planet, the economy and on the culture whilst framing the concept of social enterprise in the historical moment of the global economic crisis. Also, asserted the validity of the concept of social enterprise in any economic moment.

...established what is - and what is not a social enterprise. This involves getting deeper into the definitions, values and ethics of social enterprise. Learners can understand better what social enterprises are and the different nature of social enterprise, compared to traditional business and NGOs. There should also be a better understanding of the difference between social enterprise and companies with social responsibility.

...learnt that although the concept of "social enterprise" is relatively new, there is a long tradition in European social movements and the social solidarity economy. Learners should recognize that the current situation with social enterprise has been built on previous experiences.

...be able to draw a map of the types of entities in the social enterprise sector at least at a local level. The learner will also get to know what other players there are in their country or even internationally. Learners should discover and use the "ecosystem" around their social entrepreneurship.

...understood that to generate social impact in a sustainable manner it is necessary to connect its local operation with larger scale entities at national and global levels. Learners should be able to think about strategies and initiatives to collaborate in in order to strength its activity.

ACTIVITIES TO GET EACH PROPOSED OUTCOMES: DEVELOPMENT OF THE MODULE

STEP 1: Personal knowledge and previous experiences (estimated time 1h)

Suggestions for activities:

- 1 To collect preliminary opinions and knowledge from learners, about the concept, values, economic activities, ethics, etc. of social enterprise. For example:
 - Collect their ideas on flipchart asking each participant. Paste the papers on the wall in order to contrast with the "theories and group reflections"

2 What social enterprises do they know and why do they consider them as social enterprises. For example:

- Social Enterprise horseshoe
>>> <http://learn.socialbiz.eu/resources/single/?id=25>

3 Discussion on the role of government, businesses, social enterprises and NGOs in solving social problems. For example:

- 4 teams (government, lucrative business, NGO and social enterprise), each one must defend why they should receive money from the citizens for solving social problems. As a conclusion, try to get consensus on the role of each part.

4 Get the learners to analyse the 'ecosystem' around their social enterprise and what support is out there for their social enterprise. For example:

- Use the circle diagram, empty it of terms as they are from the UK and use it to get people to 'map' the organisations they are aware of
>>> <http://learn.socialbiz.eu/resources/single/?id=24>
- Map stakeholders, resources, contacts, etc.

STEP 2: Learn from other's experiences and generate a new experience - individual and group (estimated time 1.5hrs)

Suggestions for activities:

1 Use the case studies of social enterprises to analyse their characteristics and discover their key values and why they consider themselves a social enterprise. For example:

- SEE Learning Programme case studies and Information Sheets
>>> <http://learn.socialbiz.eu> under Case Studies
- Use articles to discover the values and ethics of social enterprises through their practical and real examples
- Jute Bag exercise
>>> <http://learn.socialbiz.eu/resources/single/?id=26>
- Triple Bottom Line debate
>>> <http://learn.socialbiz.eu/resources/single/?id=27>

2 Help to discover the essence of social enterprise and identify what they are not. For example:

- SE landscape and myths exercise
>>> <http://learn.socialbiz.eu/resources/single/?id=28>
- Use examples of companies that appear social enterprises but are not. Make groups and each one try to find some examples and their reasons for that. As facilitator, you can prepare newspaper advertisements or links in the internet (example - Coca Cola or Danone).

STEP 3: Development and learning of theories and applicable tools (estimated time 2 hours)

Suggestions for activities:

- 1 provide and discuss definitions (European and others), concepts, types of social enterprise, companies with social responsibility, social economy. For example:
 - Generate a sheet to compare social enterprise with: NGO/traditional/Solidarity: values, activities, voluntary, legal form, etc. This exercise can induce learners to introduce some changes in their idea or to decide to create another structure, for example and NGO.
- 2 Maps of sectors of activity of local and international social enterprises. Show some maps – better local ones – and help learners to locate themselves in this map. It can help to re-define the idea and to find new allies

STEP 4: Putting it into practice (estimated time 2h)

Suggestions for activities:

- 1 Get the learners to describe why they think their enterprise idea can be considered a social enterprise.
- 2 Get learners to write down the “mission” of their social enterprise and encourage them to think how this will practically solve the social, environmental, economic and cultural problems
- 3 Create a map using the Circle diagram of social enterprises and ask each learner to place their actual or future enterprise. Identify possible common challenges and collaborations.
<http://learn.socialbiz.eu/resources/single/?id=24>

ETHICAL CONSIDERATIONS TO BE ADDRESSED

The facilitator should be aware when to introduce to the module a small debate about ethical considerations. For example the debate could be about:

- What negative social impact can be generated from large traditional businesses.
- Debate about the core criteria in order to be considered a social enterprise. Is it right that companies with a slight social impact want to be identified as social enterprises? Is it a form of bonding companies to “the cause” or does it undermine the concept of social enterprise?
- Is it realistic to think that social enterprises can “change the world”?
- In theory there should be co-operation with other social organisations, but sometimes they compete for the same resources or even same users. How do you get round this problem?
- To what extent should social enterprises replace the state? Should this be a goal of social enterprise?

ASSESSMENT AND REFLECTIONS (estimated time 0.5h)

And finally the facilitator should...

- Ensure that there is time for all learners to complete an **Evaluation Sheet** on this module
>>> <http://learn.socialbiz.eu/resources/single/?id=64>
- Encourage all the learners to complete the **Reflective Grid** and ask them to make pertinent entries in their **Learning Log**.
- Relate the learning back to the original outcomes and show that they have been tackled.
- Point out to the learners that the results of these exercises will be relevant to parts of the Social Enterprise Plan.

EXAMPLE OF LESSON PLAN

Timing	What is addressed	Activity (inc. use of case studies)	Resources
0.5hr	To have introduced the modules	Introductions and expectations	Flipchart Icebreaker on trust
1hr	To introduce social enterprise	Exercise: SE horseshoe – SEA method Introduction: Definitions (European and others) Introduction to Circle diagram Triangle diagram Exercise	Presentation <i>SE landscape and myths - SEA</i> <i>SE Systems Diagram (Pearce)</i> <i>Triangle diagram (CEST)</i>
1hr	To examine the ethics and values of business	Exercise: Modify the Triple Bottom Line Debate to look at people, planet, society	<i>Triple Bottom Line Debate</i>
1hr	To consider structures for social enterprise	Introduce legal structures – M&A, choosing the appropriate Exercise: Discussion on snags and benefits of different structures	<i>Information sheet on legal structures</i> (tailored to different countries)
1hr	To look at what it means to be a social entrepreneur	Introduction innovation and entrepreneurship Exercise: What are the key things a social entrepreneur has to manage	<i>Types of entrepreneurs</i>
2hr	To look at SE in practice	Introduction to case studies Exercise: Discussion in small groups to relate to own experience	<i>Information Sheets - SEE</i>
0.5hr	To reflect on the learning	Exercise to reflect on learning	<i>Reflective Grid</i>

Key reading:

Social Enterprise in Anytown

Understanding Social Enterprise (Part 1 – P9 -113 and 134 -151)

Guide to Social Enterprise Planning (P8-19)

Website: www.empleo.usal.es/emprende

MODULE 2. CREATING social change

INTRODUCING SOCIAL CHANGE

In this module the learner has to identify the social need and find ways in which this need can be met. The idea they come up with has to not only address the social need but also ensure that the social enterprise is commercially sustainable with a large enough market. Only then can the idea be put into practice.

Also in this module, learners will define their strategy and tools which can be placed into their overall social enterprise plan.

LEARNING OUTCOMES

By the end of the module, the learner will have worked towards the following learning outcomes:

... have **obtained tools to assess social needs** and confirm what the social need actually is. Also, they will have learned to distinguish between 'needs' and 'wants'.

... **understood the concepts of creating social value and commercial value.** Identify the business potential related to a social necessity and understand that it is not easy to link and balance both objectives - commercial and social.

...**translated the value of their idea into services or products.** We will have thought through in detail what the social enterprise intends to do and how the products and services are related with social need. Some or all of these services or products will be sold in the market and, therefore, entrepreneurs must do adequate market research. On the other hand, it should be checked if the idea meets the social need identified. They should remember that 'charity is not enough' and they must check that the user, client or funder consider what adds value for them.

...**thought about the strategy to carry through their idea and how to achieve social change.** To do this, learners must define a first approach to their Vision, Mission, underpinning Values, Objectives and related Activities.

... **kept in mind that a good idea is not enough. The implementation of this idea and the future management of the company is more important.** The quality is critical to survive even with 'social' orientated consumers.

...develop an **overview of what is the core part of the Social Enterprise Plan**

ACTIVITIES TO GET EACH PROPOSED OUTCOMES: DEVELOPMENT OF THE MODULE

STEP 1: Personal knowledge and previous experiences (estimated time 1.5 hours)

Suggestions for activities:

- 1 Ask the learners what they know about the social needs and the Vision, Mission, Values, Objectives, Activities and their expectations for the module. For example:
 - Use a big piece of paper for each one of the main concepts of the module: social value, social needs assessment, needs and wants. Ask each one to write their own definitions about them, and let this papers hanged in the wall. In the Step 3, contrast the previous concepts with the “theories” and extract new definitions.
 - List local societal needs that they (or that one of them wants to address). Then, ask learners how these needs can be addressed through social enterprises in a sustainable way. Do not worry if they are not able to give answers to all of them as later in the workshop you can come back to this point.

STEP 2: Learn from other’s experiences and generate a new experience - individual and group (estimated time 1.5hrs)

Suggestions for activities:

- 1 Use the SEE Project case studies (information sheets and video clip):
 - Analyse the social needs that motivated the creation of these social enterprises. Identify the need they are addressing – Are they explicit?
 - Analyse the services and products these enterprises offer. Are they appropriate to the social necessities and the market?
- 2 Ask learners to share examples of good ideas that failed because of bad implementation or lack of quality. As facilitator, be prepared with some idea, just in case they cannot find any examples.

STEP 3 Development and learning theories and applicable tools (estimated time 2 hours)

Suggestions for activities:

- 1 Make a presentation on the Vision, Mission, Values, Objectives, Activities, Outputs and outcomes. And follow this up with exercises...
 - ... get the learners to complete a one page stating their Mission, Values, Objectives and Activities
 >>> <http://learn.socialbiz.eu/resources/single/?id=45>
 - ...then get learners to take each activity and write out using a tool to identify the Outputs and Outcomes of each Activity
 >>> <http://learn.socialbiz.eu/resources/single/?id=46>
 - ...the learners should then check that there are links between their Activities back to their Objectives, back to their overall Mission. They will also see that their Outcomes for each Activity should relate back to their Objectives

- ...encourage learners to critique each other's templates
- 2 Brief presentation of methodologies for 'analysing social reality': Interviews, secondary sources, experts, observation, surveys, etc.
 - 3 Analysing 'social consumer needs' and promote a strong attitude for quality. For example:
 - Define needs for each customer segment. What are the main differences with traditional consumers? Please refer to the Business Model Canvas for social enterprises
>>> <http://learn.socialbiz.eu/resources/single/?id=20>
 - 4 Introduction to social enterprise planning. For example:
 - Structure, suggestions, differences with a traditional business plan.
 - Introduction to the Guide to Social Enterprise Planning
>>> <http://learn.socialbiz.eu/blog/guide-to-social-enterprise-planning>
 - Introduction to Business Model Canvas
>>> <http://learn.socialbiz.eu/resources/single/?id=20>

STEP 4: Putting it into practice (estimated time 1.5 hours)

Suggestions for activities:

- 1 Ask learners to design a method to investigate how their services and products will meet the necessities of customers and people that benefit from the social enterprise and how it can generate social change. As there is not much time, suggest learners to continue the design and the research outside the workshop.
- 2 Use the Action Learning Set (ALS) methodology for each learner to introduce their idea using describing their Vision, Mission, Values, Objectives and Activities as well as expected Outputs and Outcomes. This encourages them to test their idea using the ALS.
>>> <http://learn.socialbiz.eu/resources/single/?id=10>
- 3 An alternative to the ALS is to Ask learners to share their ideas in pairs and allow time for questions.

ETHICAL CONSIDERATIONS TO BE ADDRESSED

The facilitator should be aware when to introduce to the module a small debate about ethical considerations. For example the debate could be about:

- Does it makes sense to produce superfluous luxury goods for a social purpose?
- Needs at a local and global level – are they real needs? How do you know?
- Efficiency of social enterprises: Could there be more efficient alternatives?

ASSESSMENT AND REFLECTIONS (estimated time 0.5 hours)

And finally the facilitator should...

- Ensure that there is time for all learners to complete an **Evaluation Sheet** on this module
>>> <http://learn.socialbiz.eu/resources/single/?id=64>
- Encourage all the learners to complete the **Reflective Grid** and ask them to make pertinent entries in their **Learning Log**.
- Relate the learning back to the original outcomes and show that they have been tackled.
- Point out to the learners that the results of these exercises will be relevant to parts of the Social Enterprise Plan.

EXAMPLE OF LESSON PLAN

Timing	What is addressed	Activity (inc. use of case studies)	Resources
0.5hr	To introduce the module	Introductions	Icebreaker based on building trust
Alt.	To provide an overview of a Social Enterprise Plan	(This has been brought from Module 7)	PPT
0.5hr	To introduce social enterprises as providing for needs	Presentation on social enterprise and needs (not wants) Exercise	Presentation Flipchart
Alt.	To consider how social Enterprise 'fits'	Presentation on definitions Exercise	Case Studies
Alt.	To look at a social needs study and a market study	Presentation on methodologies of 'analysing realities'	Publication from Comillas University
0.5hr	To examine SE as a response to social change	Case studies Exercise	Information Sheets - SEE
0.5hr	To look at the first stages of planning a SE	Exercise: If the starting point is need and the solution is SE, we need to understand the social purpose - Vision, Mission, Values, Objectives, Activities	Flipchart
1hr	To consider case studies and identify the Objectives and Activities	Exercise: In groups read the case study and complete the template MVOA for the case study	Information Sheet Template
1.5hr	To develop a foundation for a real social enterprise	Exercise: Individually write out Vision, Mission, Objectives, Activities for one's own SE	Template – SAN Information sheets
Alt.	To define services or products	Presentation on Vision and Mission and defining services Exercise	PPT Information sheets
1hr	To look at impact mapping	Exercise: in pairs take each activities and look at the outputs and outcomes for each activity. Critique templates	Activities, Outputs and Outcomes Template
1hr	To testing your idea and	Action Learning Set (ALS): One	Testing Questions

	introduction to pricing and volume of sales required	person is a group is the issue holder who presents	
Alt.	To test the business potential of the social change idea	Exercise: 4 viabilities model from Transformando – human, commercial, technical, financial. Apply to each idea	Testing questions Case study
0.5hr	To reflect on the learning	Exercise to reflect on learning	Reflective Grid

Key reading:

Prove Improve Account: Guide to Social Accounting and Audit (Step 1)

Social Enterprise in Anytown

Guide to Social Enterprise Planning

Understanding Social Enterprise (Part 2 – P230-246)

MODULE 3. CONNECTING with stakeholders

INTRODUCTION TO STAKEHOLDERS AND MAKING CONNECTIONS

A social enterprise is not an island! Even more than a traditional enterprise, it is linked to a wide net of relationships with its stakeholders. In the SEE Project we define a stakeholder as a person, group or organisation who are (intentionally or unintentionally) affected by or who can affect the activities of your social enterprise - for example: staff, board, partners, clients, funders, trainees, customers, etc.

The key aim of this module is to help learners understand the importance of creating stable relationships with stakeholders. This is part of the analysis which leads to a more effective communication and promotion strategy focusing on the social aspect of the social enterprise.

LEARNING OUTCOMES

By the end of the module, the learner will have worked towards the following learning outcomes:

...carried out **a full analysis of all the social enterprise's stakeholders**, also defined their profile, needs and expectations and the importance of the relationships with them.

...once the stakeholders have been defined, the learners will focus on **what needs to be done in terms of communication and promotion in order to create stable relationships with them**.

...obtained a **knowledge of the social implications of marketing/communication** and of the benefits that a social enterprise could receive from social communication, benefits to society, transparency, fair prices.

...understood **networking locally and internationally** and become aware of advantages.

ACTIVITIES TO GET THE PROPOSED OUTCOMES: DEVELOPMENT OF THE MODULE

STEP 1: Personal knowledge and previous experiences (estimated time 1.5 hours)

Suggestions for activities:

- 1 To introduce participants to the topic and support them in reflecting about the importance of creating and managing a stakeholder network. For example:
 - Use an ice-breaker on relationships (the human knot, or What's Cooking?)
>>> <http://www.busesstrainingworks.com/training-resources/free-icebreakers>
 - Ask the participants to write down their expectations from the module
- 2 Get learners to create a map of all the possible stakeholders (staff, board, partners, clients, suppliers, funders, trainees, other associations dealing with the same topic and that could create scale economies, administrations interested in the issue tackled by the social enterprise, public authorities dealing with the social problem, local and international networks,

beneficiaries, media, communities ...). This can help the social enterprise to understand what to focus on and what communication strategies to be undertaken in order to create contact with those stakeholders. A social business is connected to many individuals and organisations and should take advantage of all possible partnerships that can support its activities.

3 Present the issue of stakeholders (who they are) and discuss it with participants. Discuss the issue of stakeholders' needs and expectations and ways to identify them (survey, observation, context analysis, etc.). Ask participants to contribute with their previous professional experience. The focus of the discussion should be on the importance of understanding the expectations and needs of the stakeholders and creating contacts with them.

STEP 2: Learn from others' experiences and generate a new experience - individual and group (estimated time 2 hours)

Suggestions for activities:

1 Present a case study (for example the Information Sheet about Great Gardens (UK)) and define who key stakeholders are and what is your relationship with them. Ask participants to work in groups and to start with creating a simple map of the stakeholders, listing them in a simple map (as an example using a post-it for each stakeholder and putting them on a flip chart), then trying to group them according to similarities (by needs, expectations, importance, social/commercial importance...)

2 An extension of the activity above is, after having created this first simple map, ask participants to try and insert them into a quadrant grid with two dimensions:
(a) influence-power of stakeholder (from no influence to a lot of influence)
(b) interest of stakeholder (from no interest to high interest).

3 Following on from the activity above you could encourage a sharing of ideas where each group presents their maps and this is followed by discussion. A further extension of this could be group-work which involves asking the participants to read another case study from the list of SEE Project cases studies and to create a map of stakeholders, with in-group discussion.

4 The facilitator should now make the participants focus on their own social enterprise idea. For example:

- Ask the participants to develop their own stakeholders map for their social enterprise and identify the relationship they have with the stakeholders. The see how the social enterprise can take advantage from the relationship and vice versa. Ask the participants to present their map in pairs and open peer feedback.

STEP 3: Development and learning of theories and applicable tools (estimated time 1.5 hours)

Suggestions for activities:

1 Once the stakeholders have been identified, each SE needs to define the strategy to create an effective relationship with them. For example:

- Introduce the idea of a communication strategy referring to practical examples, focusing both on the contents – WHAT; and on the channels - HOW (examples can be taken from websites, advertising material, letters, etc.). Take also into consideration that, according to marketing theories, communication can be also considered as a mix of different levers (price, product, advertisement, distribution channel and partners), but traditional communication is widely discussed and in this module the facilitator should focus more on the social aspect.
- Ask the participants to find a specific example of successful/unsuccessful communication strategy from their experience and share in groups also discussing why they think it was/it was not successful. The reflection should focus on specific communication actions to be undertaken to create a connection with stakeholders.

2 Use an adapted Customer Empathy Map which can be modified to retain a social perspective.

>>> <http://learn.socialbiz.eu/resources/single/?id=44>

3 Make a presentation on the 5/7 Ps and get the learners to think about how this fits **with** their social enterprise in relation to their stakeholders

>>> <http://learn.socialbiz.eu/resources/single/?id=29>

STEP 4: Putting it into practice (estimated time 2 hours)

Suggestions for activities:

- 1 Participants have now the opportunity to focus on their own SE communication strategies. For example:
 - Ask the learners to refer to one of their social enterprise stakeholders and think about a communication strategy to approach the stakeholder. They should concentrate on both contents and channels to reach the stakeholder. Then each learner is given some minutes to present the strategy to the rest of the class. Feedback by the other participants; or...
 - Participants have to prepare a speech in order to convince one or more stakeholders about the opportunity to create a stable relationship between the social enterprise and the stakeholder. As an example it can be a simulation of a presentation to a board of the municipality/a committee of an ethical bank that is looking for a social enterprise to support. The board will vote for the best idea to support. Learners are given some minutes to do the speech and the other participants should act as the board of the municipality/bank, asking for more questions or identifying critical aspects.
- 2 Learners could be given an opportunity to write a short marketing and communication strategy based on their stakeholder analysis. This can be tested in the workshop using ALSs.

ETHICAL CONSIDERATIONS TO BE ADDRESSED

The facilitator should be aware when to introduce to the module a small debate about ethical considerations. For example the debate could be about:

- Stakeholders should be considered as a source of value, inspiration, knowledge sharing and contribution to be tackled with a collaborative logic. Is this true?

- Use marketing/communication but always consider that the final goal is to create social value. Do you agree?
- Social Enterprise should always make choices that suits the organisation's values and its ethos, respecting practices in the professional domain. How important is this?
- What are the limits of marketing/communication?

ASSESSMENT AND REFLECTIONS (estimated time 0.5 hours)

And finally the facilitator should...

- Ensure that there is time for all learners to complete an **Evaluation Sheet** on this module
>>> <http://learn.socialbiz.eu/resources/single/?id=64>
- Encourage all the learners to complete the **Reflective Grid** and ask them to make pertinent entries in their **Learning Log**.
- Relate the learning back to the original outcomes and show that they have been tackled.
- Point out to the learners that the results of these exercises will be relevant to parts of the Social Enterprise Plan.

In addition, here are some additional useful questions for the learners that can be used to reflect about the module:

- Am I clear about all the stakeholders of my social enterprise?
- Am I clear about my stakeholders needs and expectations?
- Do I fully understand the relationship I have (or want to have) with my stakeholders?
- What are the key messages and what are the channels I want to use to reach my key stakeholders?
- How well do I (and will I) communicate and promote?
- How do I market what we do well with stakeholders?

EXAMPLE OF LESSON PLAN

Timing	What is addressed	Activity (inc. use of case studies)	Resources
0.5hr	To have introduce the module	Introductions	Icebreaker based on building trust
0.5hr	To introduce learners to stakeholder mapping	Presentation on stakeholders and mapping	PPT
1hr	To examine a case study and its stakeholders	Exercise: draw a stakeholder map which analyses relationships	Information Sheets - SEE
1hr	To map the stakeholders of the learner's own social enterprise	Exercise: stakeholder mapping for each SE	Flipchart
1hr	To focus on customers and clients	Exercise: Customer Empathy map	Customer Empathy Map
Alt.	To introduce marketing concepts from the point of	Exercise: Complete a questionnaire from the Comillas	Questionnaire

	view of social enterprise	University (Spain)	
1hr	To understand promotion and marketing more effectively	Presentation on 5/7 Ps Exercise	PPT 5/7 Ps Handout
1hr	To develop a communication and marketing strategy	Exercise: Learners given opportunity to write a communication strategy	Flipchart Information sheets - SEE
0.5hr	To present their marketing and communication strategy	Series of presentations and answering questions leading to discussion	Walls!
0.5hr	To reflect on the learning	Exercise to reflect on learning	Reflective Grid

Key reading:

CEST Transfer, Local Social Economy Learning Package – read about ‘social marketing’

MODULE 4. ACCOUNTING for quality and impact

INTRODUCTION TO QUALITY AND SOCIAL IMPACT

A fundamental characteristics of a social enterprise is to create a positive impact on people (social), the planet (environment), the local economy and on society more generally. Social enterprises should be able to quantify and communicate this impact as an overall social value to all their stakeholders. Moreover, the social value generated should be taken into account in attracting social investment.

This module will introduce the learners to assessing quality and measuring impact so that they can adopt techniques and are able to account for and prove they are achieving their central social purpose. In particular it will enable the learners to realise just how important it is to assess, explain or measure the social impact of a social Enterprise; and it will show how social impact assessment can fit into the life cycle of their organisation.

This module will look at two approaches to impact assessment: Social Accounting and Audit and Social Return on Investment. It will consider the key differences and similarities in these two approaches and will try to help the learner be aware of other quality systems to ensure their performance.

LEARNING OUTCOMES

By the end of the module, the learner will have worked towards the following learning outcomes:

...to have realised the **importance of assessing performance and the impact** of the social enterprise in terms of the affect on people, the planet, the economy and presiding culture

...understood the basic processes involved in **Social Accounting and Audit; and Social Return on Investment** and **other approaches**. This will help the learner in choosing which approach to adopt

...have a **clearer idea of how impact might be accounted for, and reported on, within their social enterprise**

...be able to **communicate the social value** generated by their social enterprise to their stakeholders

...understand better how to complete the appropriate section in the **Social Enterprise Plan** devoted to social impact measurement.

ACTIVITIES TO GET EACH PROPOSED OUTCOMES: DEVELOPMENT OF THE MODULE

STEP 1: Personal knowledge and previous experiences (estimated time 0.5 hours)

Suggestions for activities:

1 Facilitator asks the learners what they know about the issue and their expectations for the module. They follow this with a presentation on the relevance of quantifying, qualifying and communicating social impact in which the concept of impact is introduced. Learners are invited to reflect on their personal experiences

STEP 2: Learn from others experiences and generate a new experience - individual and group (estimated time 1 hours)

Suggestions for activities:

1 Learners use a worksheet to write out 3 things that they would like to account for in their organization but cannot or do not at the moment. They share this with the person next to them and each pair discusses how these things could be assessed or measured.

STEP 3 Development and learning theories and applicable tools (estimated 4.5 hours)

Suggestions for activities:

1 Introduce quality systems. For example:

Here you can find a presentation for introducing Impact measurement issues
>>> <http://learn.socialbiz.eu/resources/single/?id=35>

Refer to the Key Aspects Checklist which covers six factors common to all social enterprises: how they treat their human resources (staff and volunteers); what do they do with any surplus or profit from their activities; how are they governed; financial sustainability (financial accounts); environmental sustainability (green credentials); and what is their local economic impact.

>>> <http://learn.socialbiz.eu/resources/single/?id=30>
Use and exercise to explore the Key Aspects Checklist.

2 Introduce the main elements of Social Accounting and Audit (SAA) with a presentation
>>> <http://learn.socialbiz.eu/resources/single/?id=33>
Follow this is an exercise on the Snags and Benefits of this approach
>>> <http://learn.socialbiz.eu/resources/single/?id=32> (this is a worksheet for this activity)

3 Introduce the main elements of Social Return on Investment (SROI)
>>> <http://learn.socialbiz.eu/resources/single/?id=34>

4 Follow the introduction of SAA and SROI with groups of learners carrying out a critique of actual SAA or SROI reports
>>> <http://learn.socialbiz.eu/resources/single/?id=31>

5 Introduce other recent developments in social impact and invite learners to have a general discussion about this fast moving but central concept to social enterprises

STEP 4: Putting it into practice (estimated time 1 hours)

Suggestions for activities:

1 Get the learners to work in pairs on how they might introduce tracking social impact within their organization. What information and data do they need to collect that is essential, important but not essential, not so important. Compile a worksheet that they can complete, discuss with their peers and then take away.

ETHICAL CONSIDERATIONS TO BE ADDRESSED

The facilitator should be aware when to introduce to the module a small debate about ethical considerations. For example the debate could be about:

- The ethical and moral dimensions of monetising social impacts
- The difficulties of giving an acceptable value to qualitative information
- The difficulties of assessing the true impact over long periods
- The importance of assumptions in the final assessment for social reports

ASSESSMENT AND REFLECTIONS (estimated time 0.5 hours)

And finally the facilitator should...

- Ensure that there is time for all learners to complete an **Evaluation Sheet** on this module
>>> <http://learn.socialbiz.eu/resources/single/?id=64>
- Encourage all the learners to complete the **Reflective Grid** and ask them to make pertinent entries in their **Learning Log**.
- Relate the learning back to the original outcomes and show that they have been tackled.
- Point out to the learners that the results of these exercises will be relevant to parts of the Social Enterprise Plan.

EXAMPLE OF LESSON PLAN

Timing	What is addressed	Activity (inc. use of case studies)	Resources
0.5hr	To have introduced the module	Introductions	Icebreaker based on building trust
0.5hr	To introduce the need for systems to ensure quality and social impact	Presentation: Introduction to Accounting for Quality and Impact Exercise	Slides Worksheet
0.5hr	To relate measuring social impact to own social enterprise	Exercise: In pairs and use worksheet to identify what to measure and how	MSI Workshop – Worksheet
1hr	To examine quality systems	Presentation: Quality systems	PPT

		Exercise: Key Aspects Checklist	Key Aspects
1hr	To introduce Social Accounting and Audit	Presentations Exercise Snags & Benefits	PPT Worksheet
1hr	To introduce Social Return on Investment	Presentation: SROI Present: Similarities/ differences	PPT
1.5hr	To look at Social Reports (SAA) and SROI Reports	Exercise: Small groups look at SROI report or Social Accounts and critique it	SROI Reports Social Accounts
Alt.	To get the learners to work on their own ideas to measure their impact	Exercise: Get learners to think about how they can measure the impact of their social enterprise	Flipchart
0.5hr	To detail the recent developments	Presentation: Recent developments	PPT
0.5hr	To reflect on the learning	Exercise to reflect on learning	Reflective Grid

Key reading:

Prove Improve Account: Guide to Social Accounting and Audit (2011)

A Guide to Social Return on Investment

Understanding Social Enterprise (Part 2 – P230-246)

SAN website links

SROI Network website link

ONG con Calidad (Spain)

MODULE 5. INVOLVING people and leading

PEOPLE AND SOCIAL ENTREPRENEURSHIP

At its core, a social enterprise is a collaborative venture to make the world a better place. The key asset in such a venture – and even more when it comes to innovation – is people. A dedicated team of competent and committed people will resist bad luck and errors, and keep the right and true direction towards the future.

The aim of this module is to help social entrepreneurs understand that the internal structure of a social business is as important as its productive and marketing process. There are two aspects which are more relevant in social enterprises than in other organisations: firstly, the clear and strong way in which core values are usually felt by the founders does not automatically guarantee that those values are experienced and shared by all other employees; and secondly, to keep their ethical standards, social enterprises have to ‘walk the talk’ and embody in their structure their key values, related, for example, to participation, environmental sustainability, etc.

LEARNING OUTCOMES

By the end of the module, the learner will have worked towards the following learning outcomes:

...organisations can be designed in many different ways, in order to try to fit their environment or fulfill their goals. Each social enterprise should find its appropriate organisational structure, and also make it function within existing legal forms. This module helps participants **understand the range of governance models** – including **country-specific legal structures** – for social enterprises.

...the “double nature” of social enterprises, as economic organisations based on social values, requires responsible leadership. This module will provide tools to identify the **importance of leadership and participation** peculiar to social enterprise.

...different leadership and management types fit different organisations. In this respect social enterprises are peculiar, because they are based around important social values. This module will help participants become aware of **different management styles appropriate for social enterprise**.

...organisational design, leadership, participation, and management: all this should serve the primary purpose of the social enterprise, helping it **develop, change and grow**.

...leadership runs in parallel with support and guidance for employees – and this is especially true in social enterprises. So, this module will analyse the benefits of **coaching and mentoring in running a social enterprise**.

ACTIVITIES TO GET THE PROPOSED OUTCOMES: DEVELOPMENT OF THE MODULE

STEP 1: Personal knowledge and previous experiences (estimated time 1.5 hours)

Suggestions for activities:

Learners are prospective (or actual) social entrepreneurs, and leadership is part of being a social entrepreneur. The goal of this activity is helping them to reflect on (a) what leadership is and (b) on what kind of leaders they are.

1 Allow participants to share a simple leadership and trust experience. For example:

- Select an ice-breaker on leadership (the human knot, or counting up to 20 as a group with no explicit rule, etc.).
- Show a piece of a movie on leadership and governance (for example, from *Master and Commander*, or *the Gladiator*, etc.).

2 Collect individual and group experiences about leadership. For example:

- Have people write down their best and worst leadership experience in their previous professional life.
- Have people describe their “nightmare” and their “dream” colleague and/or boss.

3 Briefly present types of leadership, following the 4 Leadership Archetypes Sheet

>>> <http://learn.socialbiz.eu/resources/single/?id=36>

Then, hang a symbol for each type in each corner of the room and have people drift to the one they feel attracted to. Encourage people discuss about their choice and why. What does a company need? (Make the point that no unique rule exists, and that a good balance between all types of leadership is usually key to success). Then for example:

- Have people reflect on what are their strengths as leaders, and what they miss. How do they intend to fill the gap?
- At the end of this activity, ask people to write down what kind of leadership they imagine for their social enterprise, and how it fits with the core values of the social enterprise

3 At the end of this activity, ask the participants to sum up what they have learnt about leadership and leadership in the social enterprise. What do they think is important for a social enterprise, as opposed to other organisations (commercial enterprises, state institutions, etc.)?

STEP 2: Learning from others’ experiences and generate a new experience – individual and group (estimated time 1.5 hours)

Suggestions for activities:

Leadership has an impact when it acts within a suitable organisational structure as it contributes in defining and shaping that organisation. This step is about learning when organisational structures can help sustain the activities of social enterprises and how they work in decision making.

1 Present a change and decision-making case study. For example using some case studies, such as

>>> Re-Union Full Case Study <http://learn.socialbiz.eu/blog/re-union/>

or the Information Sheets about

>>> Associazione Seed (CH) <http://learn.socialbiz.eu/blog/associazione-seed/>

>>> Guri i Zi (Italy) <http://learn.socialbiz.eu/blog/guri-i-zi/>

or

- 2 Present an open case study in which a social enterprise has a strategic decision to make and ask learners to discuss how they would make the decision; or
- 3 Select a movie that presents a leadership situation, such as *Apollo XIII*, *Gladiator* or *Master and Commander*. The focus of the discussion should be on the importance of organisational structure to face business challenge, and on the values that such organisational structure embody in daily practice. How is decision making structured? What does it say about the organization?
- 4 Then discuss the each case, and ask learners to present additional similar cases based on their previous professional experience.

STEP 3: Development and learning of theories and applicable tools (estimated time 2.5 hours)

Suggestions for activities:

In this section participants will be provided with theories, information and tools useful to bring their projects forward.

- 1 Examine organizational form - ways of thinking about the organization. For example:
 - Introduce the idea that organisations can have different forms that depend on their size, business, legal constraints, but also on choices.
 - Using examples, introduce the options on which an organisation form can be designed: hierarchical/flat, centralised/distributed, division of tasks/collaboration, etc. It is recommended to introduce participative models, for example using the Rogert-Hart Ladder of Participation (look it up on Google!).
 - Propose a decision-making situation in a social enterprise.
 >>> <http://learn.socialbiz.eu/resources/single/?id=37> (this is an example)
 In pairs, learners sketch out how they would solve the situation if they were managers in a social enterprise. What would be the decision process? What parts of the organisation would play what roles?
 - Collect feedback: what impact has this on running a social enterprise?
- 2 Consider legal structures. This is a country-specific activity and facilitators should present the legal structure opportunities that a social enterprise can choose from in a specific country. Each legal form usually has advantages and drawbacks (in terms of flexibility, risk management, internationalisation, fiscal norms, etc.), which should be pointed out. In organising this, the facilitator should keep in mind that:
 - Local examples, rather than international ones, should be used here to illustrate the concept
 - Reference to national legislation should be provided, including indications about the procedures required to actually set-up organisations with different legal forms.

- Having a special guest, expert in this matter, can be of help.

3 Present 2-3 case studies of how social enterprises have defined their organisational and leadership structure. SEE Information Sheets can be of help here, but also local cases can be useful. To optimise time, you can also refer to the same case studies used in STEP 2.

STEP 4: Putting it into practice (estimated time 1.5 hours)

Suggestions for activities:

1 Every organization needs leadership and structure – including hierarchy and decision-making processes. Learners could be asked to design the organisation of their social enterprise. How do they imagine it? The following questions could be used:

- What are the core values of their social enterprises?
- What leadership type or forms will embody and promote such values?
- How can such values be embodied in their organisational structure?
- How do they imagine that employees will come to share the core social values of the enterprise? What degree of participation can be imagined?
- What legal form suits the social enterprise? How will it be more suitable than others?

To make the work more effective, facilitators can organise participants into small groups, and arrange a structure of peer-presentation and review of the organisational designs or use ALSs.

ETHICAL CONSIDERATIONS TO BE ADDRESSED

The facilitator should be aware when to introduce to the module a small debate about ethical considerations. For example the debate could be about:

- Adopting a structure that suits the organisation and its ethos, respecting practices in the professional domain. How can this be done?
- The types of leadership and management in order to “walk the talk” and effectively communicate and share the core values. What type of leadership is the ‘best’?
- The tension in being democratic and egalitarian and at the same time decisive/effective. How does a social entrepreneur manage this?

ASSESSMENT AND REFLECTIONS (estimated time 0.5h)

And finally the facilitator should...

- Ensure that there is time for all learners to complete an **Evaluation Sheet** on this module
>>> <http://learn.socialbiz.eu/resources/single/?id=64>
- Encourage all the learners to complete the **Reflective Grid** and ask them to make pertinent entries in their **Learning Log**.
- Relate the learning back to the original outcomes and show that they have been tackled.
- Point out to the learners that the results of these exercises will be relevant to parts of the Social Enterprise Plan.

In addition, here are some additional useful questions for the learners that can be used to reflect about the module:

- Do I understand the range of legal and governance structures that are available; and can I choose one that fits our organisation?
- What types of leadership and management styles do we need in our organisation?
- How can we manage what we do - to be most effective?
- What kind of support does our organisation need and can I get it?
- Do we need to solve any debate about growth and democracy?

EXAMPLE OF LESSON PLAN

Timing	What is addressed	Activity (inc. use of case studies)	Resources
0.5hr	To have introduced the module	Introductions	Icebreaker based on building trust
2hr	To introduce the array of legal structures available	Introduction to legal structures (country specific) Exercise	PPT Legal information about social enterprise
1hr	To introduce types of leaders	Exercise: Four leadership archetypes	Four leadership archetypes sheet - SEA
Alt.	To introduce types of leaders	Presentation using some parts of the Final Flight of the Phoenix	Final Flight of the Phoenix
1hr	To introduce management structures	Exercise: get each learner draws their own organisational structure	Flipchart
1hr	To consider some of the difficult decision making within social enterprise	Exercise: In groups get learners to think about some of the key management difficulties peculiar to social enterprises.	Flipchart Understanding Social Enterprise (Tables 6.1 and 6.2)
1hr	To introduce the ANTS and CATS technique of looking at management issues	Introduce ANTS (Automatic Negative Thoughts) and CATS (Capability Affirming Thoughts) Exercise	PPT ANTS and CATS description and worksheet
Alt.	To recognise the benefits of coaching and mentoring in running a social enterprise	Presentation on definitions and techniques Exercise	Coaching scenarios
0.5hr	To reflect on the learning	Exercise to reflect learning	Reflective Grid

Key Reading:

Understanding Social Enterprise (Part 2 – P117-133) – Management debates

Understanding Social Enterprise (Part 2 – P134-151) – Legal structures

Understanding Social Enterprise (Part 2 – P193-209) – Social entrepreneurship

Edward de Bono – Six Action Shoes

Here is a relevant website links on mentoring and coaching: www.findhornconsultancy.org

MODULE 6. ACHIEVING financial sustainability

KEEPING YOUR ENTERPRISE FINANCIALLY SUSTAINABLE

This module will provide the learner with a basic understanding of balance sheets, profit and loss statements, and cash flow forecasting. It will concentrate on how a social enterprise ensures financial sustainability through social investment, raising funds, using sweat equity as well as earning an income. Being financially sustainable is important for the social enterprise to survive and finding the correct balance between income generating activities and other means of financing.

LEARNING OUTCOMES

By the end of the module, the learner will have worked towards the following learning outcomes:

...a basic understanding of the **financial book-keeping systems, the three key financial tools of balance sheet, profit and loss, and cashflow**

...an Increased knowledge of **funds, social investments and ways to ensure financial sustainability**

...greater recognition of **why some social enterprises fail** through lack of collateral, over-reliance on one type of customer and other scenarios

...an understanding on how social enterprises are **financially different**

ACTIVITIES TO GET THE PROPOSED OUTCOMES: DEVELOPMENT OF THE MODULE

STEP 1: Reflecting on personal knowledge and previous experience (estimated time 1.5 hours)

Suggestions for activities:

Since participants can either be actual social entrepreneurs or potential social entrepreneurs, not all of them will be able to give a personal view from the business perspective. So in this part personal financial sustainability can also be addressed here.

Determining which participants already have some knowledge about financing and which ones do not is also key in this first step.

1 Each learner draws two pie charts for themselves – one for their income and one for their expenditure. Not amounts - only the proportions of income, etc. Have them present their charts and discuss briefly

2 Write down some key words (Profit & Loss, cash flow, costs, funding, pricing, income) on different flipcharts and ask learners to give their personal definitions on these subjects. Flipcharts can be re-used later in the module to reflect on the learning.

STEP 2: Learning from other's experiences and generate a new experience – individual and group (estimated time 1.5 hours)

Suggestions for activities:

- 1 In this part you can present the participants with the case studies
 >>> <http://learn.socialbiz.eu/casestudies/>
 and/or the dummy accounts.
 >>> <http://learn.socialbiz.eu/resources/single/?id=42>
- 2 Introduce the 3 main financial statements (balance sheets, profit & loss, cash flow). For example:
 - Show the PPT on the financial statement
 >>> <http://learn.socialbiz.eu/resources/single/?id=38>
 - In small groups get the learners to discuss and pass judgment on the financial health of the organisation with the dummy accounts and/or the case studies
- 3 Demonstrate how to generate a cashflow forecast.
 >>> <http://learn.socialbiz.eu/resources/single/?id=43>
 For example:
 - In pairs get each pair of learners to look at a cashflow forecast case study and write a critique of the assumptions behind the cashflow
 - Feedback and discuss how cashflows are used and why they are important

STEP 3: Development and learning of theories and applicable tools (estimated time 2 hours)

In this section participants will be provided with theories, information and tools useful to bring their projects forward.

Suggestions for activities:

- 1 Show a PPT introducing price, cost and full cost recovery. Get learners to work in pairs to do the cashflow full cost recovery exercise (Costing it Up Worksheet, Costing it Up Model)
- 2 Introduce sources of income and the financial mix on Powerpoint
 >>> <http://learn.socialbiz.eu/resources/single/?id=41>
 For example: grants, loans, contracts, crowd funding, 'sweat' equity, social investment. Try to give an overview of all local initiatives and possibilities
- 3 In small groups encourage the learners to discuss the difference between a traditional and a social enterprise on the subject of taxes, benefits return, grants, ...

STEP 4: Putting it into practice (estimated time 2 hours)

Finally participants can take a look at their own (or future) social enterprise. Also introduce the potential pitfalls they might encounter with finance management.

Suggestions for activities:

- 1 Have participants draw up a scheme of their cost-structure and let them discuss this in pairs
- 2 In pairs also let them think about their own social enterprise and prioritise the different sources of funding. This is the beginning of developing a financial funding strategy. Each learner identifies ways of funding their social enterprise.
- 3 In large groups and using their own experience get the learners to write down all the reasons why social enterprises fail. Then on the other side of the flipchart write down how these reasons can be overcome

ETHICAL CONSIDERATIONS TO BE ADDRESSED

The facilitator should be aware when to introduce to the module a small debate about ethical considerations. For example the debate could be about:

- How to balance both financial sustainability and at the same time maximising social purpose. Is this possible?
- A social enterprise should not be primarily making more money for people who already have money at the expense of poorer people... Discuss!
- Is social investment where investors receive a financial return from a social enterprise morally defensible?
- Making money through trading goods and services is a means to an end, not an end in itself. Discuss...

ASSESSMENT AND REFLECTIONS (estimated time 0.5h)

And finally the facilitator should...

- Ensure that there is time for all learners to complete an **Evaluation Sheet** on this module
>>> <http://learn.socialbiz.eu/resources/single/?id=64>
- Encourage all the learners to complete the **Reflective Grid** and ask them to make pertinent entries in their **Learning Log**.
- Relate the learning back to the original outcomes and show that they have been tackled.
- Point out to the learners that the results of these exercises will be relevant to parts of the Social Enterprise Plan.

EXAMPLE OF LESSON PLAN

Timing	What is addressed	Activity (inc. use of case studies)	Resources
0.5hr	To have introduced the module	Introductions Exercise: Each learner draws two pie charts for themselves – one	Flipchart for exercise Icebreaker based

		for their income and one for their expenditure	on building trust
1hr	To introduce the three main financial statements	Introduction to P&L, Cashflow and Balance Sheet Go through Dummy Accounts Exercise	PPT <i>Financial Glossary – Dummy accounts - SEA</i>
1hr	To understand more about cashflow and why it is important	Demonstrate how to generate a cashflow on computer Exercise	<i>Cashflow template</i>
Alt.	To introduce a basic understanding of book-keeping systems and the three financial tools of balance sheet, profit and loss, and cashflow	Presentation on balance sheets, Profit and loss; and cashflows Exercise: Practical exercise on the three basic building blocks in financial accounting	PPT <i>Exercise worksheets on EXCEL</i>
Alt.	To introduce tax exemptions for non-profit organisations	Presentation (country specific) Exercise (country specific)	<i>Country specific information</i>
2hr	To introduce pricing, costs and full cost recovery	Introduce costs and pricing Exercise	PPT <i>Worksheet Model</i>
1hr	To identify sources of income – grants, loans, contracts, social investment	Introduce sources of income and the financial mix – including crowd funding, ‘sweat’ equity, social investment Exercise	PPT <i>Country specific information on finance</i>
1hr	To consider some of the reasons social enterprises fail	Exercise	Flip chart
0.5hr	To reflect on the learning	Exercise to reflect on learning	<i>Reflective Grid</i>

Key Reading:

Understanding Social Enterprise (Part 2 – P210-229)

International and local sources of funding

www.danonecommunities.com

www.goteo.org

MODULE 7. PLANNING social enterprise

PLANNING AND SOCIAL ENTREPRENEURSHIP

Writing a business plan is a common task at the outset of any entrepreneurial activity. A business plan has a two-fold value, so to say, an *inward* goal and an *outward* goal.

On the one hand, it helps the entrepreneurial team to describe their plan consistently, keeping together their goals, their aspirations, actual constraints and what they know about the market. Writing a business plan is a kind of 'reality-check', and at the same time an exercise of ordered creativity. This is the inward goal.

On the other hand, the outward goal of a business plan is making the business idea understandable to others, especially to stakeholders including potential funders. A well-written business plan is a powerful communication and engagement tool.

What is true in business planning also applies to social enterprise planning – only, it is more complex. It is more complex because the business plan, or social enterprise plan, is where the business structure meets the social goals of the enterprise. This encounter can become a clash, but a creative entrepreneur will be able to harmonise these two strands.

LEARNING OUTCOMES

By the end of the module, the learner will have worked towards the following learning outcomes:

... to have understood the essential **requirements of social enterprise planning**, that is, what are the goals, structure and style of a business or social enterprise plan. This is the basis for writing an effective social enterprise plan.

...to have learnt about **how to compile** a social enterprise plan with all the necessary elements, that is, moving to the put the plan into practice and develop an original social enterprise plan based on her/his ideas.

STRUCTURE OF THIS MODULE

This module is intended as a stand-alone 2-day training module. This structure will help learners to focus on what they are doing and to more easily identify connections to make a consistent social enterprise plan.

Please note that there is a case for not having this module as a stand-alone module. One of the disadvantages of having it as a 2-day module is that learners will later have to do work within their own organisation to be able to write the social enterprise plan with all the details. It may make sense, therefore, for the 2 days to be split with 'homework' or set tasks between the two days. Indeed, all the other modules feed into the compilation of a social enterprise plan and in some ways Modules 0 – 6 can be seen as steps towards the development of the overall plan. On the other hand this module has been designed to stand alone.



The proposed methodology in this module can be easily adapted to fit the needs of the learners.

ACTIVITIES TO GET THE PROPOSED OUTCOMES: DEVELOPMENT OF THE MODULE

This module is different than previous ones, as it is, in some ways, where all the previous efforts converge as a final step towards transforming the knowledge acquired in the programme into a real social enterprise. Previous modules will help directly in compiling a social enterprise plan. For this reason, the proposed activity structure differs from the other modules.

The learning outcomes will be approached through two different perspectives, each supported by a specific conceptual tool: the *Guide to Social Enterprise Planning* and *Using the Business Model Canvas for Social Enterprise Design*.

The two approaches blend together in supporting the process of social enterprise planning and offer multiple access points to this complex and delicate task.

A. Guide to Social Enterprise Planning

The *Guide to Social Enterprise Planning* developed by JUST the Business is available in the materials map. The guide will provide a streamlined step-by-step process that will lead to the development of the social enterprise plan.

If you plan to have this module as a stand-alone 2-day workshop, we suggest that you use the guide as main reference for planning the activities. A detailed lesson plan suggesting this approach is available at the end of this module. In this case, the Business Canvas Model will be a complementary 'overview tool' that you can introduce to help participants identify and reflect on the interconnections in their plan. You can present the Business Canvas Model to the learners and then allow them to work on it from any perspective they prefer, providing support especially in time management so that no item on the Business Canvas Model remains underdeveloped due to lack of time. As a facilitator, try to make sure that all the relevant and required information is entered into the Social Enterprise Plan.

>>> <http://learn.socialbiz.eu/blog/guide-to-social-enterprise-planning/>

B. Using the Business Model Canvas for Social Enterprise Design

The Business Model Canvas (Ingrid Burkett, Knode) is presented available in the materials map. It is simple, and can provide a consistent view of how the previous modules can fit together. In other words, the Business Model Canvas will help participants see the connections across the different elements in their plan.

If you plan to have this module intermingled amongst the other modules thus leading up the writing of the plan, we recommend you use the Business Model Canvas as a 'map' to keep track of progress during the learning programme. This map will help participants not to lose track of the different aspects discussed and the knowledge they have gained. In this case, the Business Model Canvas should be presented right at the beginning of the programme, and the Guide to Social Enterprise Planning will become a useful support tool for the final write-up of the plan, as it will help transform the map into a streamlined presentation.

>>> <http://learn.socialbiz.eu/resources/single/?id=20>

About preferences

Please note that, depending on their learning style and experience, some participants might find either model more straightforward. Help them select the approach they feel most at ease with, and help them to see the overall picture of the social enterprise they are working on. Any blend or combination of these models can work, as long as no important aspects are left out.

An additional tool...

A useful suggestion about how to proceed with business planning can come from the Lean Startup model which presents the start-up process as a serious attempt to identify a sustainable path for innovation. Looking in more detail at this tool is worthy of consideration.
>>> <http://leanstartup.com/>

ETHICAL CONSIDERATIONS TO BE ADDRESSED

Key consideration in this module comes from the awareness that a social enterprise plan is intended for an organisation that has the ethos of social and community benefit as its *core* business. It is thus different from a traditional “Business Plan”.

In the writing of the social enterprise plan try to get the learners to think about what they are compiling. The following questions may help in this process:

- Can we emphasise or exaggerate our resulting social and community benefits to convince investors we are worthy of support?
- Is it fair to hide or minimise problems with the business model we have adopted?
- To what extent can ideas be ‘borrowed’ from other existing businesses?
- Is the social ‘spirit’ held within our ideas real, or is it a ‘camouflage and are we truly just another regular business?

ASSESSMENT AND REFLECTIONS (estimated time 0.5h)

And finally the facilitator should...

- Ensure that there is time for all learners to complete an **Evaluation Sheet** on this module
>>> <http://learn.socialbiz.eu/resources/single/?id=64>
- Encourage all the learners to complete the **Reflective Grid** and ask them to make pertinent entries in their **Learning Log**.
- Relate the learning back to the original outcomes and show that they have been tackled.

In addition, here are some additional useful questions for the learners that can be used to reflect about the module:

- Do I fully understand what should be included in a Social Enterprise Plan?
- How do I get the information that is required in order to write a Social Enterprise Plan?



- Do I feel confident to write a Social Enterprise Plan that will show me clearly what our social enterprise needs to do?
- Who are the actual target readers of my Social Enterprise Plan?

SAMPLE LESSON PLAN

DAY 1				
Time	What is addressed	Activity (inc. use of case studies)	Resources	Relating this to individuals working on-line
0.5hr	To have introduced the modules, the people and developed trust between learners	Introductions Expectations for the module and starting points Ground rules Exercise: Exercise on trust	Flipchart for expectations Icebreaker based on building trust	N/A
1hr	To provide an overview of a social enterprise plan	Introduce the Key Questions (shown in the Guide) with the Tasks (1-23) and the different sections expected in a Social Enterprise Plan Questions and answers	PPT	Read the Guide
1hr	To answer: What is the background to your organisation and this plan; and What are your Strengths Weaknesses, Opportunities and Threats	Guide the learners through Task 1, 2 and 3. Exercise: Carry out Task 3: SWOT Analysis and share with another learner to improve it. Pin it up under Background.	Paper and flipchart	Complete Task 1, 2 and 3
1hr	To answer: What is the need that your ideas will address	Guide the learners through Task 4 Exercise: In groups look at a case study and identify the needs that they are addressing. List these needs and discuss if the social enterprise is addressing these needs and to what degree	Information Sheets	Complete Task 4
2hr	To answer: What do you want to do?	Guide the learners through Task 5, 6, 7, 8 Exercise: Carry out Task 6: Stating your vision, mission, values, objectives/activities and Task 7: Expected inputs, outcomes and impact	Paper and flipchart	Complete Tasks 5, 6, 7, 8

1hr	To answer: What is the expected products and services and who is involved	Guide the learners through Task 9 and 10 Exercise: carry out Task 10: Analysing your Stakeholders	Paper and flipchart	Complete Task 9 and 10
0.5h	To reflect on the learning	Exercise: Display a number of images and photographs. Invite learners to pick one that best sums up the day and talk to it. Go round the room getting each learner to say how they feel about the day's learning.	Flipchart	N/A

DAY 2				
Time	What is addressed	Activity (inc. use of case studies)	Resources	Relating this to individuals working on-line
0.5hr	To re-group and look forward to the day	Exercise: All learners answer the question...If social enterprise was an animal what would it be? Put it on a post-it and stick it up after explaining why they have chosen that animal	Flipchart	N/A
3hr	To answer: How will you do what you want to do	Guide the learners through Task 11, 12, 13, 14, 15, 16, 17 Exercise: In 2-3 groups all learners draw the structure of their social enterprise (Task 11) and present it to the other members in their group. Exercise: Ask each learner to choose to go into much more detail in one of the following: Task 13: Market Analysis; Task 14: Competition and exemplars; Task 15: Developing a Marketing and Sales Strategy; and Task 16: Pricing.	Flipchart ALS set up for the second exercise	Complete Tasks 11, 12, 13, 14, 15, 16, 17

		Each learner presents their thoughts back to the groups using an ALS		
1hr	To answer: What is the finance required and how will it be monitored	Introduce Task 28 and the three main financial statements: P&L, Cashflow and Balance Sheet Demonstrate the Annex 4: Cashflow- SE template Distribute the Financial Glossary	PPT – SEA (modify the SEA one as it is too simplistic; perhaps use one from GCU) Financial Glossary – SEA	Complete the template on finance
1hr	To answer: How will you keep track of the social value you create	Guide the learners through Task 19, 20, 21 Exercise: In small groups the learners discuss how they will keep track of their social value. Finally completing a worksheet	Worksheet with four quadrants: What do know about social value? What do I need to find out on social value? Where do I find that information? Who can help me?	Complete the worksheet and complete Tasks 19, 20, 21
0.5	To answer: What plans and targets do you have; and Any final remarks	Guide through Tasks 22 and 23	N/A	N/A
0.5hr	To reflect on the learning	Exercise: Group exercise on: What we have learnt well? What has been tricky? What will we now do differently? What shall we ponder about? Reflective Grids completed	Reflective Grid	Reflective Grid

FINAL REMARKS

In THE Facilitators Handbook we have detailed each of the eight modules. There is a focus on the important aspects of social enterprise and not on all aspects of running a successful business as that information and learning can be obtained from the more traditional business training programmes.

If you use any of some of the information used in this Handbook we would be delighted to hear any feedback you may have. The SEE Project is keen to improve and adapt the material to ensure that it is useful and effective in supporting social Enterprise across Europe.

The SEE project website is www.socialbiz.eu.